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15 OCT 1984

MEMORANDUM FOR: (See Distribution List)

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FROM:

[redacted]
Chief, Strategic Resources Division
Office of Global Issues

SUBJECT: Soviet Grain Crop Prospects

1. The attached memorandum is the fifth and last in a series of typescripts analyzing crop conditions in the Soviet Union. It presents our end-of-season grain production estimate.

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[redacted]

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2. This assessment was prepared by [redacted]
Agricultural Assessments Branch, Strategic Resources Division,
Office of Global Issues. [redacted]

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3. Comments and questions are welcome and may be addressed to the Chief, Agricultural Assessments Branch, [redacted]

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[redacted]

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Attachment:

USSR: 1984 Grain Production Estimated at

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180 Million Tons

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GI M 84-10177, October 1984 [redacted]

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[redacted]

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[redacted]

[redacted]

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OGI/SRD/AAB/ (15 October 84)

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MEMORANDUM

USSR 1984 Grain Production Estimated at 180 Million Tons

As of early October, we estimate that the 1984 Soviet grain crop will total about 180 million tons, 15 million tons less than last year's estimated output, and 60 million tons below plan. Our estimate is down 5 million tons from a month ago, due to downward revisions in yield estimates for Kazakhstan and the Volga Valley, and in the size of the grain area that we expect to be harvested. These reductions are based on analysis of recent collateral reporting and satellite imagery. [redacted]

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Harvest operations which had slowed-down during August because of above normal rainfall in Northern European Russia and West Siberia, benefitted by a spell of relatively dry weather during the first half of September; however, on 1 October harvesting lagged 9 million hectares behind the average pace of the past five years. A delay of this magnitude so late in the crop season is not likely to be overcome. [redacted]

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Kazakhstan. We now expect 1984 grain production in Kazakhstan to be only about 19 million tons, 8.5 million tons below average and the lowest harvest since the 1975 disaster of 12 million tons. [redacted]

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The hot, dry weather that plagued much of the republic in July again hit the northern oblasts in mid-August--during the critical grain-filling stage--reducing grain yields even further. [redacted]

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[redacted] Recent Soviet press reports have described the agricultural conditions in Kazakhstan as extremely complicated, a euphemism which frequently heralds a harvest shortfall. [redacted]

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By mid-September about 22 million hectares of grain had been harvested. Favorable sunny and warm weather is facilitating the harvest and only minimum harvest losses are expected. [redacted]

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Ukraine, Belorussia, Moldavia, and Baltic. Our analysis of weather data and satellite imagery continues to indicate that these regions will have good to excellent grain crops this year. In addition, Soviet press reports describe grain yields as good in many oblasts of the Ukraine, rich in Moldavia, and indicate near-record output in Lithuania and Belorussia. [redacted]

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Sunny, dry weather in late August and early September favored a speedy harvest with minimal losses. Except for corn, which is reported to be in good condition, the harvest is now virtually complete in all areas. []

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Central region and Urals. We expect a slightly above average grain crop in the Central Region and an average harvest in the Urals, with good yields in the northern oblasts offset by a poor harvest in Orenburg. []

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By the end of September approximately 3 million hectares of grain (14 percent of the total) remained to be harvested in these regions. The harvest pace in the northernmost oblasts was hindered by heavy precipitation. []

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Volga Valley, Volga Vyatka, and Central Black Earth. In average years these areas produce about 40 million tons or 20 percent of the total Soviet grain crop. They were hard-hit by a late spring/early summer drought, and are unlikely to produce more than 25 million tons this year. The small amount of post-harvest straw residues [] indicates that most of the area did not recover from the drought. We believe that final grain yields will be about 10 ce/ha, 7% lower than we estimated a month ago. []

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By mid-September harvest operations were practically completed in all areas, except in the more northern oblasts of Volga-Vyatka where heavy rains have hindered the harvest and may cause more than the normal harvest losses. []

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North Caucasus. Straw-dump analysis and Soviet press reports of good yields for Krasnodar and Stavropol confirm our estimates for an above-average grain crop for the region. []

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As of the first week in October most of the corn had yet to be harvested. However, according to [] press reports, corn for grain is in good condition. []

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Transcaucasus and Central Asian Republics. Favorable harvest reports by the press in the Central Asian Republics of Turkmen and Kirgiz, and Azerbaijan in the Transcaucasus, are consistent with our prediction of above average grain production in these areas. []

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Siberia. Analysis of post-harvest straw residue [] support Soviet press reports of good to excellent grain crops for both East and West Siberia. However, grain crops have been slow maturing because of a cool summer, and harvest operations have fallen behind the normal pace, increasing the threat of field abandonment because of early snowfalls. []

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By the end of September we estimate that there were about 3 million hectares, or one quarter of the Siberian grain areas

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remaining to be harvested. [REDACTED]

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Outlook for the 1984 grain crop. Our 180 million ton estimate is predicated on the Soviets successfully harvesting the remaining 10 million hectares of grain with the minimum of losses. [REDACTED]

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Most of the grain remaining to be harvested consists of corn for grain in the North Caucasus and the Ukraine, and spring grains in some of the more northern oblasts of European Russia and Siberia. Some harvest losses due to excessive rains or premature snowfalls may be incurred in these areas. Average occurrence of such weather events during the next month should not change our 180 million ton estimate. On the other hand, extremely unfavorable harvest conditions in the areas still to be harvested would lower our present estimate by 5 million tons, at the most. [REDACTED]

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Table 1
USSR: Grain Production^a
(Million tons)

	Actual 1976-80 Average	Estimated ^b			
		1981	1982	1983	1984
Total	205.0	158.0	180.0	195.0	180.0
By Republic:					
RSFSR	113.9	78.0	99.5	112.0	96.0
Ukraine	43.1	38.2	42.0	39.0	44.0
Kazakhstan	27.5	23.8	19.5	25.0	19.0
Other	20.5	18.0	19.0	19.0	21.0
By Crop:					
Wheat	99.7	81.0	90.0	80.0	78.0
Coarse ^c	95.1	68.0	80.0	102.0	92.0
Other ^d	10.2	9.0	10.0	13.0	10.0

^a Measured in bunker weight, that is, gross output from the combine, which includes excess moisture, unripe and damaged kernels, weed seeds, and other trash. For comparison with United States or other countries' grain output, an average discount of 11 percent should be applied.

^b The USSR has not published overall grain production or yield statistics since 1980. Total grain production in 1981 was unofficially reported at 158 million tons. Data for Kazakhstan for 1981 and 1982 are official. All other figures represent our estimates.

^c Coarse grain comprise rye, barley, oats, corn, and millet.

^d Other grains include pulses, buckwheat, and rice.

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